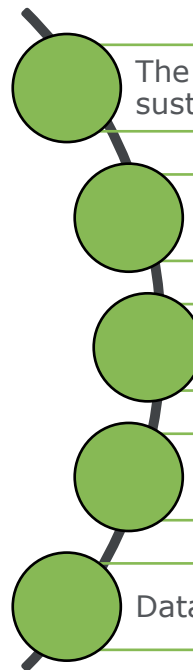


2025 TSC Annual Declaration

Summary of Results



2025 TSC Annual Declaration

- 
- The TSC has 12 commitments covering economic, visitor, community and environmental sustainability. It has been signed by over 2000 businesses
 - Each year all signatories are requested to complete an annual declaration so that progress against these commitments can be monitored.
 - This report reflects the current state of progress by respondents in advancing the Tourism Sustainability Commitment's twelve Commitments.
 - This is the fourth such survey of TSC signatories, run since the disruption caused by the COVID-19 pandemic.
 - Data from this survey will build on our knowledge for on-going tracking of TSC progress.

Methodology



The NZ Tourism Sustainability Commitment

ECONOMIC

Tourism delivers opportunity and prosperity across the New Zealand economy.

- 1 Resilience**
We focus on long term business performance and resilience.
- 2 Investment**
Invest to create value, opportunities and to drive sustainability practices.
- 3 Innovation**
Innovate to solve problems, create new ways to do things and increase productivity.

VISITOR

New Zealand provides world-leading experiences for both international and domestic visitors.

- 4 Visitor Satisfaction**
We strive to always meet or exceed visitor expectations.
- 5 Culture and Heritage**
Embrace Aotearoa New Zealand's culture and heritage as part of delivering a unique and authentic visitor experience.
- 6 Visitor Engagement**
We engage with visitors about how to be great travellers within Aotearoa New Zealand.

COMMUNITY

New Zealanders understand, support, shape and benefit from tourism operating in their communities.

- 7 Employer of Choice**
We attract, support and develop the workforce we need to flourish and succeed.
- 8 Community Engagement**
We actively and positively engage with the communities in which we operate, taking a leadership role to champion causes that are important to the community.
- 9 Sustainable Supply Chains**
We have socially and environmentally sustainable supply chains.

ENVIRONMENT

Tourism strongly contributes to protecting, restoring and enhancing New Zealand's natural environment and biodiversity.

- 10 Restoring Nature**
We contribute to protecting and enhancing Aotearoa New Zealand's environment, including water, biodiversity, landscapes and clean air.
- 11 Carbon Reduction**
We act urgently to contribute to Aotearoa New Zealand's transition to a net zero carbon economy.
- 12 Eliminating Waste**
We take responsibility for the entire life cycle of products and services we use and ultimately eliminate the waste associated with these.

Executive Summary - Key Insights



98% of respondents recognise sustainability as important to their business



Businesses will prioritise sustainability to meet customer expectations and improve profitability



The top barriers to progress are a lack of time and resources



Overall business confidence has declined in the last 3 years



Increasing numbers of business are *measuring* their carbon footprint, but fewer are getting *certification*.



Most businesses are confident of attracting and retaining the staff they need, offering a wide range of staff benefits



Many businesses are not yet proactively encouraging visitors to be good travellers by sharing the Tiaki Promise



Most businesses (73%) said they had been impacted by changing weather patterns



Most businesses are contributing to Predator Free 2050 by building actions into their business plans

Sustainability Progress

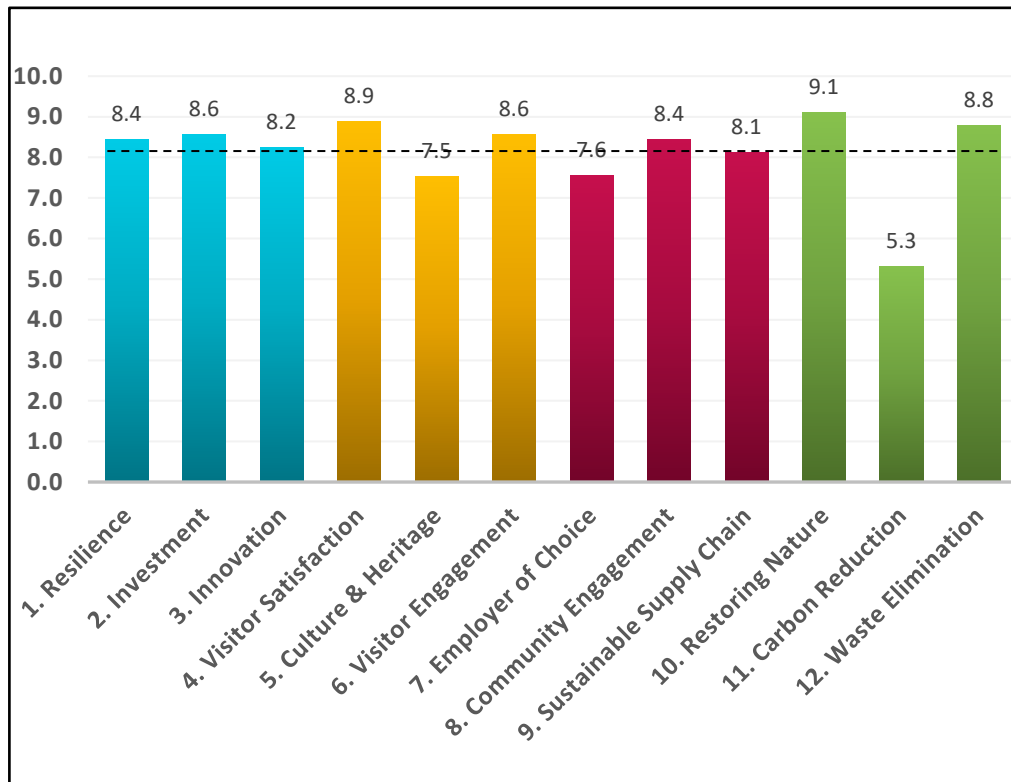
As in previous years there is a big discrepancy between sustainability aspirations and actions.

However, there is a slight increase in the number of operators with sustainability metrics, plans and a budget.



2024	99%	53%	43%	18%
2025	98%	55%	48%	22%
	say sustainability is important to their business	include sustainability metrics in reporting	have a sustainability plan	have a sustainability budget

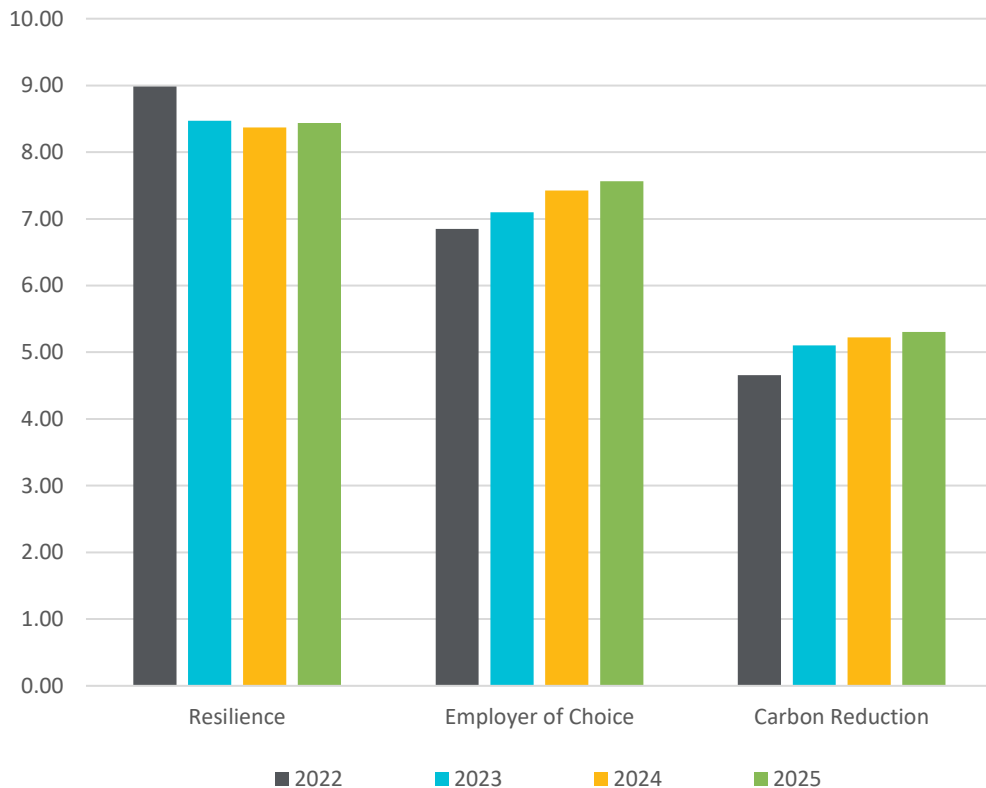
Score by Commitment 2025



Average Score is 8.1

- There are some small variations between commitments, but the overall average has remained *extremely similar* for 4 years.
- 2022 avg score = 8.06
- 2025 avg score = 8.13
- This indicates stability across many areas reflecting a level of maturity in systems and processes.

Commitments with the most significant changes

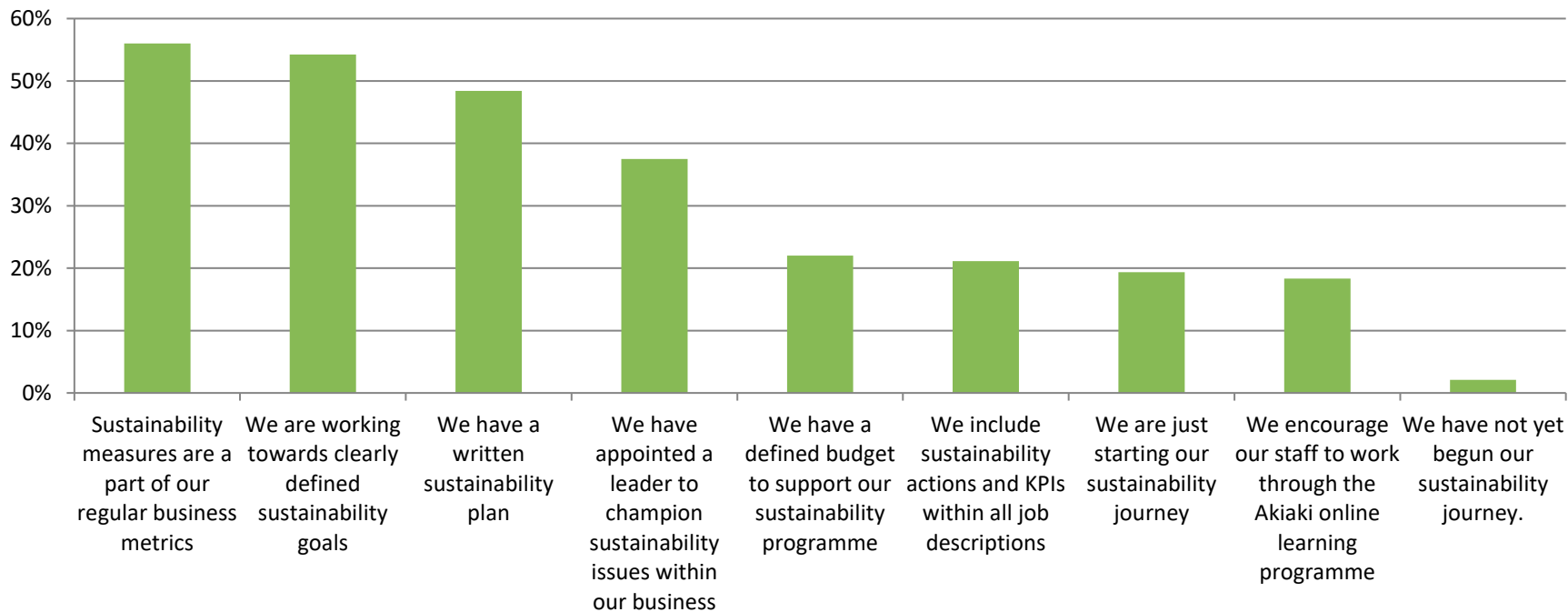


Compare 2025 to 2022:

- Resilience (business confidence) scored comparatively high in 2022 and has declined from 9.0 to 8.4
- Being an employer of choice has increased from 6.8 to 7.6
- Carbon reduction has increased from 4.5 to 5.3

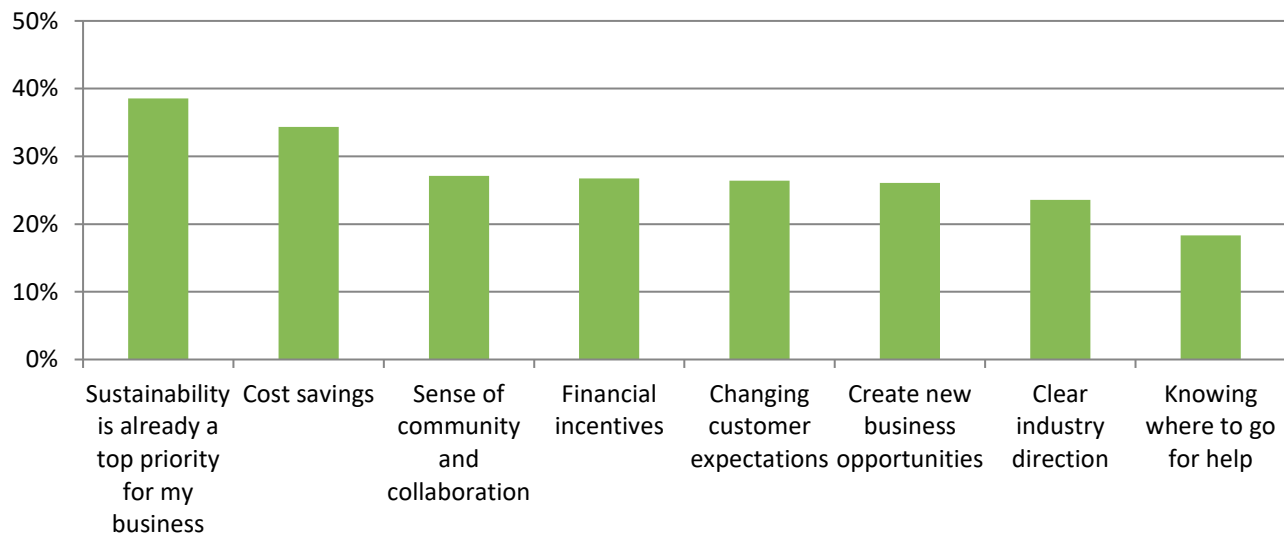
Businesses are taking a purposeful approach to sustainability

Select the statements which align with your business operations.



Motivation

What would motivate you to make sustainability a higher priority in your business?



- For 39% sustainability is already a top priority
- For the others a stronger business case needs to be made to drive sustainability actions
- Businesses will prioritise sustainability to meet customer expectations and improve profitability.

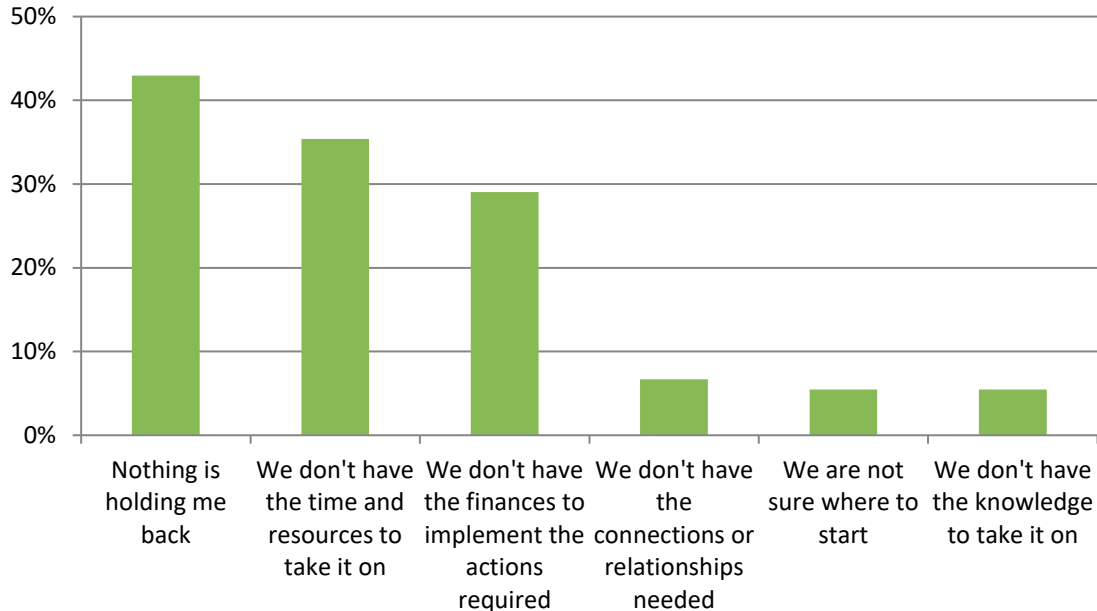
We struggle to know what sustainability initiatives to implement

Government investment in sustainability, rather than fast-tracking non-sustainable initiatives.

Hearing from customers that sustainability is an important motivator in choosing where to stay

Barriers

What is holding you back from making progress towards your sustainability goals?



- Time and financial constraints continue to be significant barriers to progress.
- 43% say nothing is holding them back from making progress towards sustainability goals

Government and local councils are way behind in providing the infrastructure to enable further improvement.

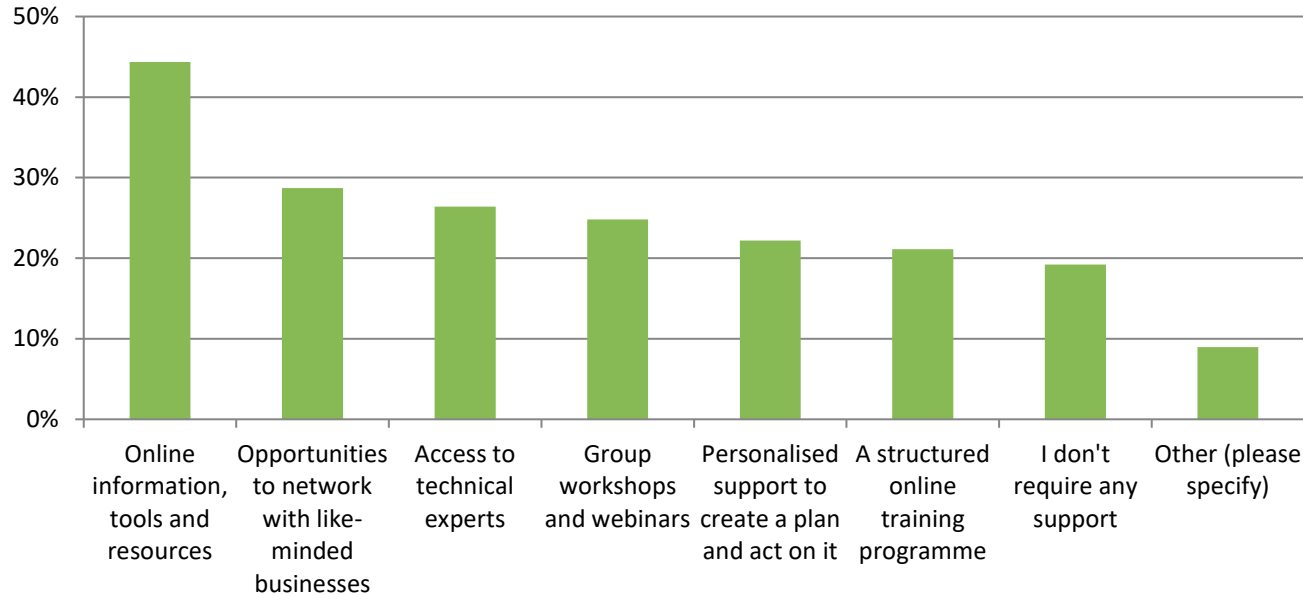
Infrastructure within NZ is part of the Sustainability is always front of mind however it's knowing what really makes a difference ie where to focus on the changes reason.

We want to bring in Hybrid/electric buses but we can't due to the law and there is no subsidy.

We are progressing but not as quickly as initially thought.

Support

What support would help you accelerate your sustainability actions?



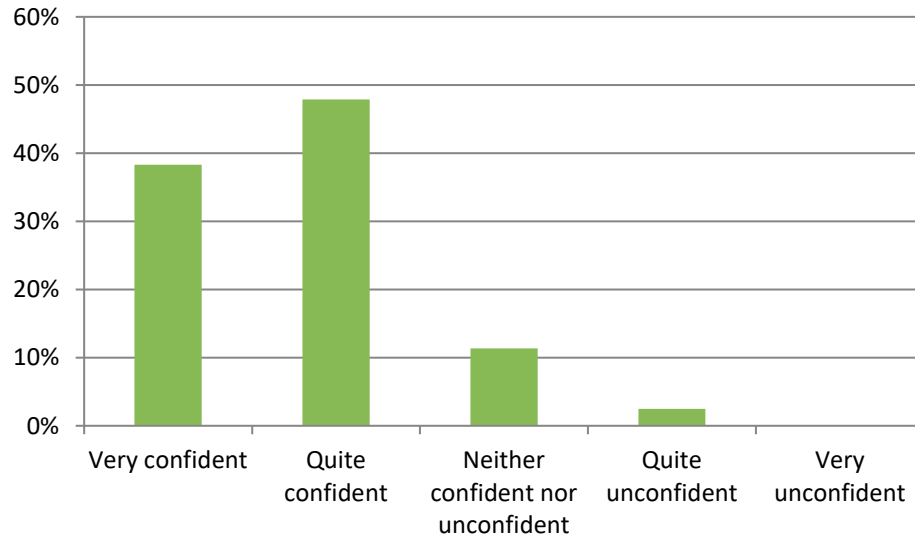
- Businesses prioritize online information, tools, and resources (46%) as the most desired support to accelerate their sustainability actions.

Access to funding to achieve our next steps

Tax incentives

Commitment 1: Resilience

How do you feel about the future of your business?



- 86% of businesses feel confident about their future, which is a very slight improvement on last years' results (84%).
- Only 38% of businesses are "very confident" about their future, a significant drop from 60% reported in 2022.
- Data from the latest 2025 Workforce Survey very closely aligns with these results: 86% of businesses reported feeling at least "somewhat optimistic" about the 12 months ahead, up 11% on 2024.

What are your biggest concerns regarding the future resilience of your business?

- 73% said their business had been impacted by changing weather patterns.

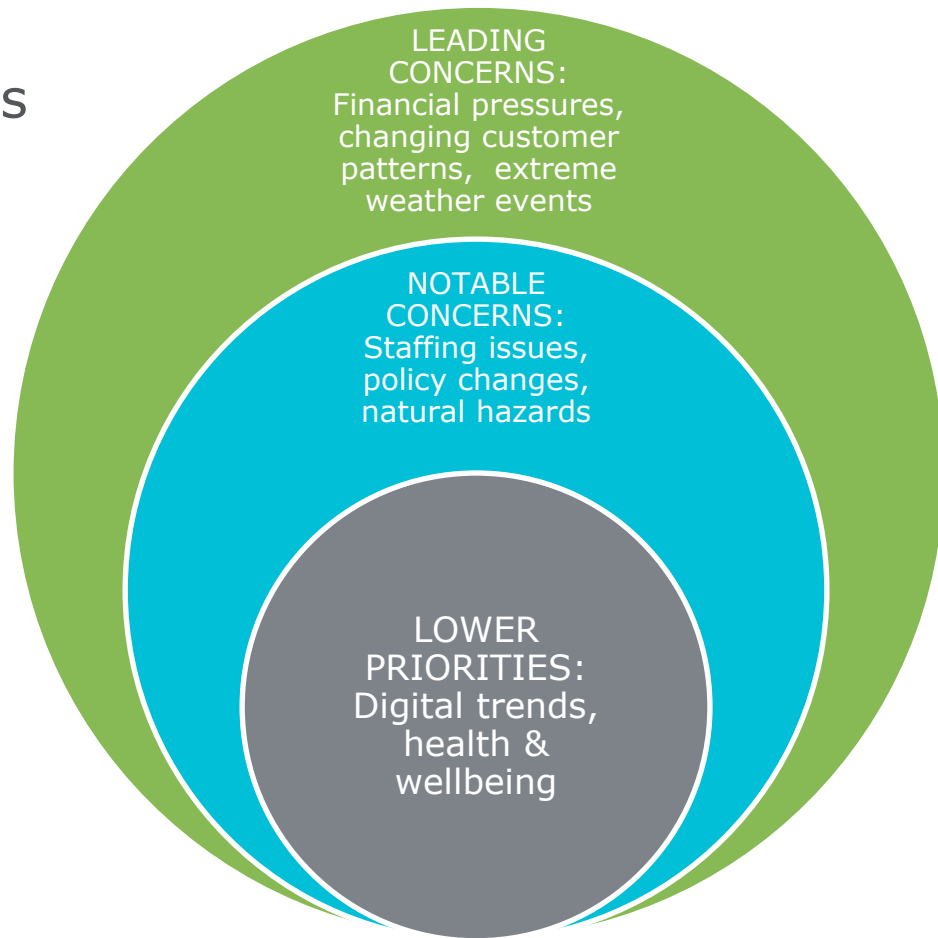
Global health, political and financial events

International instability leading to drastic visitor market changes over short periods of time.

The last two years have been the worst ever in the last three decades!!!

DOC and Iwi making changes to concessions

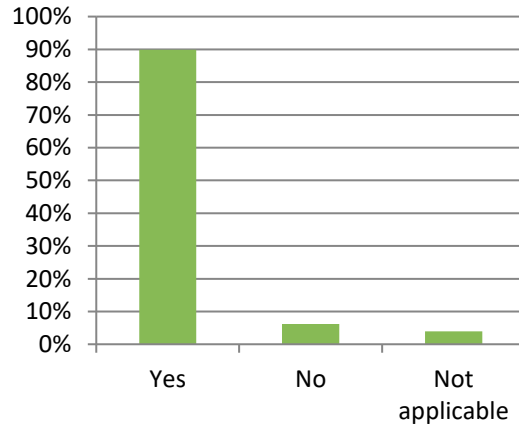
Cyber security



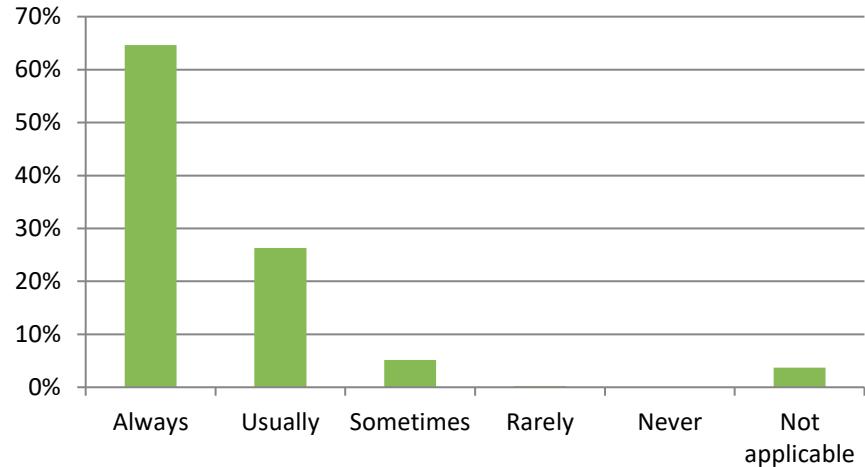
Commitment 4: Visitor Satisfaction

- While nearly all businesses measure customer satisfaction levels, not all business owners always act on customer feedback.

Does your business
measure the satisfaction
levels of your customers?



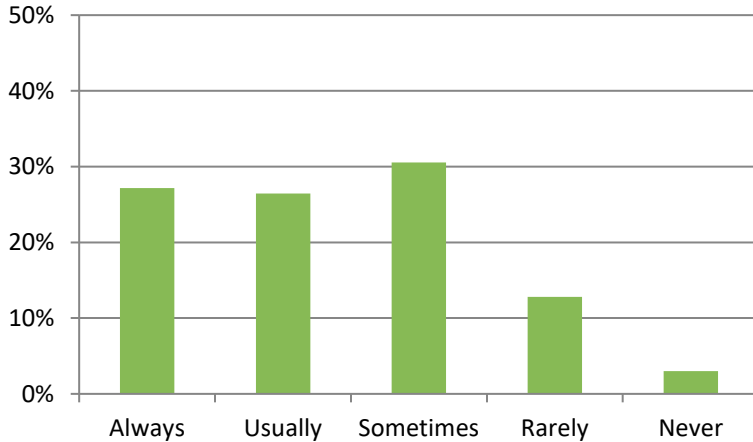
Do you act on visitor feedback to improve
your offering to customers?



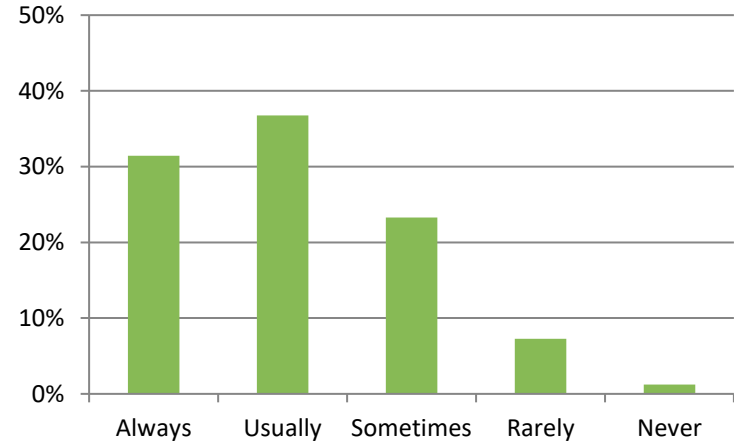
Commitment 5: Culture & Heritage

- Our unique point of difference is not yet being fully embedded in the experiences we offer our visitors.
- There is room to improve how we embrace and share the cultural aspects of the visitor experience.

Do you work to include Māori language and culture within your business and in the experience that you offer to customers?

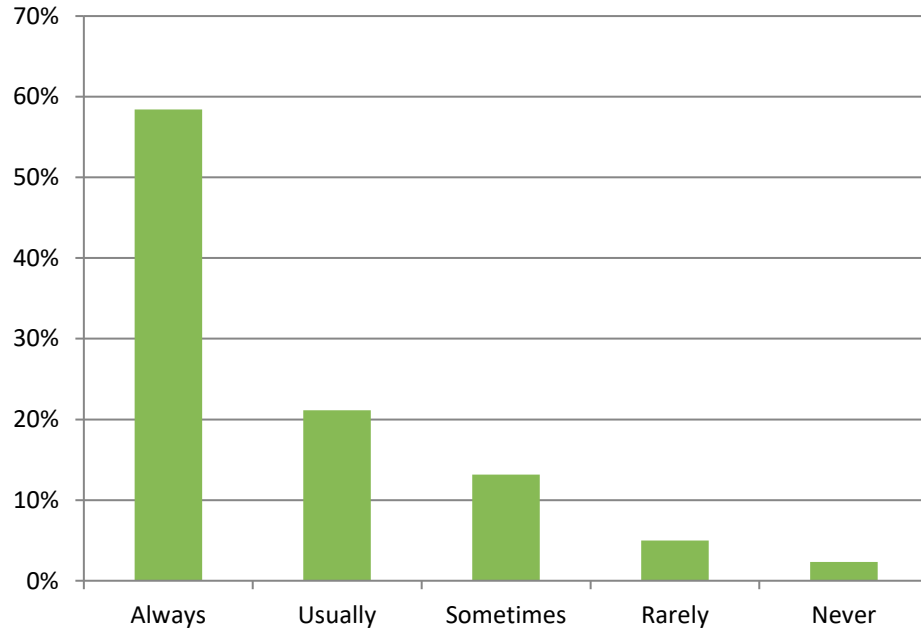


Do you work to include other aspects of NZ's cultures and heritage within your business?



Commitment 6: Visitor Engagement

Do you proactively encourage visitors to be good travellers in NZ (e.g. by sharing the Tiaki Promise)?



- Embedding the Tiaki Promise is one of the 10 actions in the Tourism 2050 Blueprint
- However many businesses are not yet proactively encouraging visitors to be good travellers by always sharing the Tiaki Promise

Commitment 7: Employer of Choice

- 62% are extremely or very confident that they can attract and retain the staff they need.
- This is a slight increase on last year (59%)

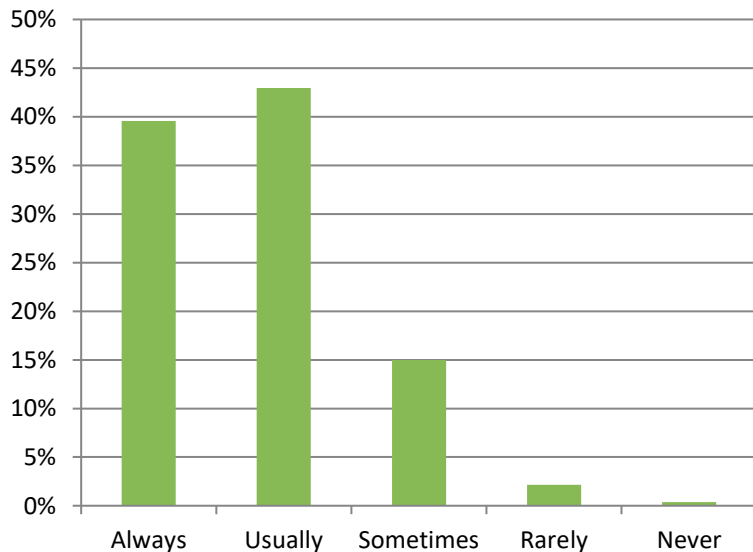
What are you currently doing to ensure that you are an employer of choice?



Commitment 8: Community Engagement

Commitment 9: Sustainable Supply Chains

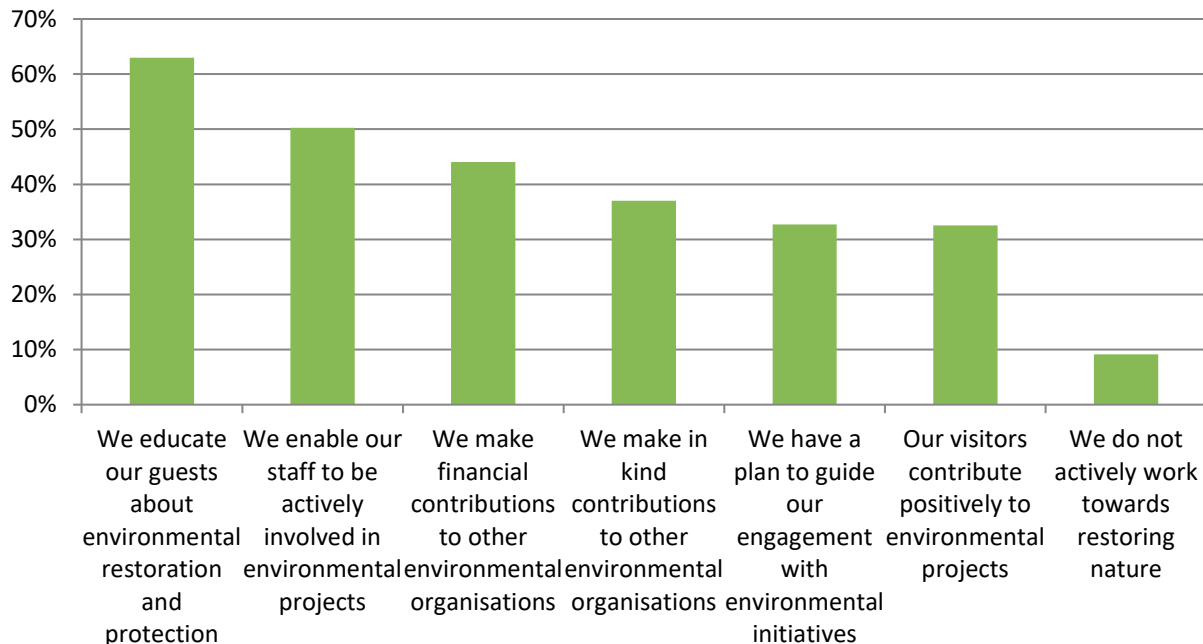
Do you prioritise sourcing products and services which are produced locally?



- Most businesses (80%) engage with their local community either "always" (48%) or "usually" (32%) to create mutual benefits and 54% have a plan to guide this work.
- Many respondents always (25%) or usually (49%) work with suppliers to ensure that their purchases are the most sustainable options available. However for a quarter of respondents this is not a common consideration.
- Buying local is strongly favoured by tourism operators where possible, with a majority (83%) always or usually sourcing local products.

Commitment 10: Restoring Nature

How do you actively contribute to protecting and enhancing NZ's natural environment?



- 92% of respondents always or usually consider the impact of their actions on the environment.
- 32% are NOT supporting any predator-free programmes.

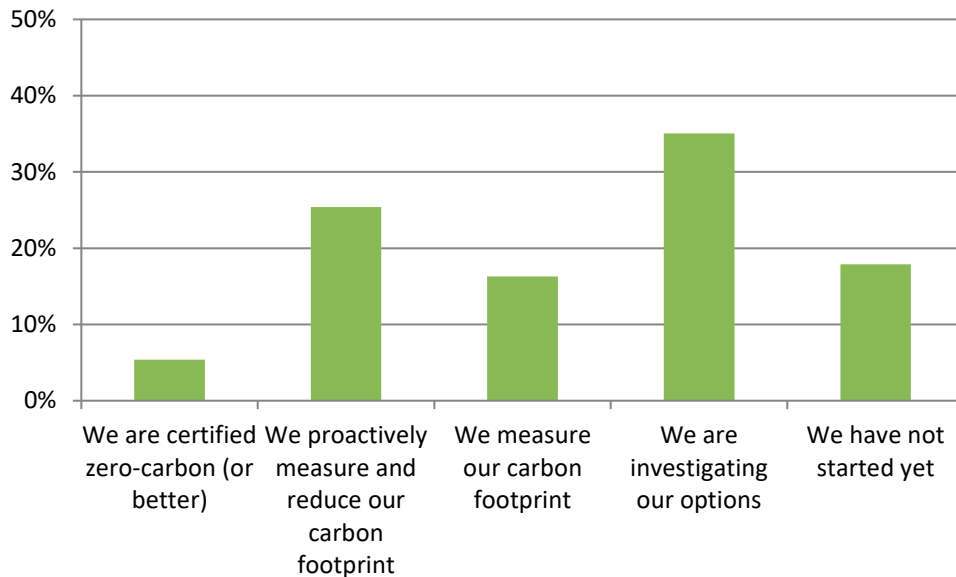
Our guests have the opportunity to "Go Green" which involves opting out of room servicing. A portion of the money saved from labour costs here goes to our Sustainability Fund.

We have planted several thousand trees on our and neighbouring sections. We are seeing more and more native birds. Guests love seeing kereru and pukeko in particular.

We have our own conservation project and a charitable trust set up to assist with this work

Commitment 11: Carbon Reduction

How far along are you on the journey to becoming a zero-carbon business?



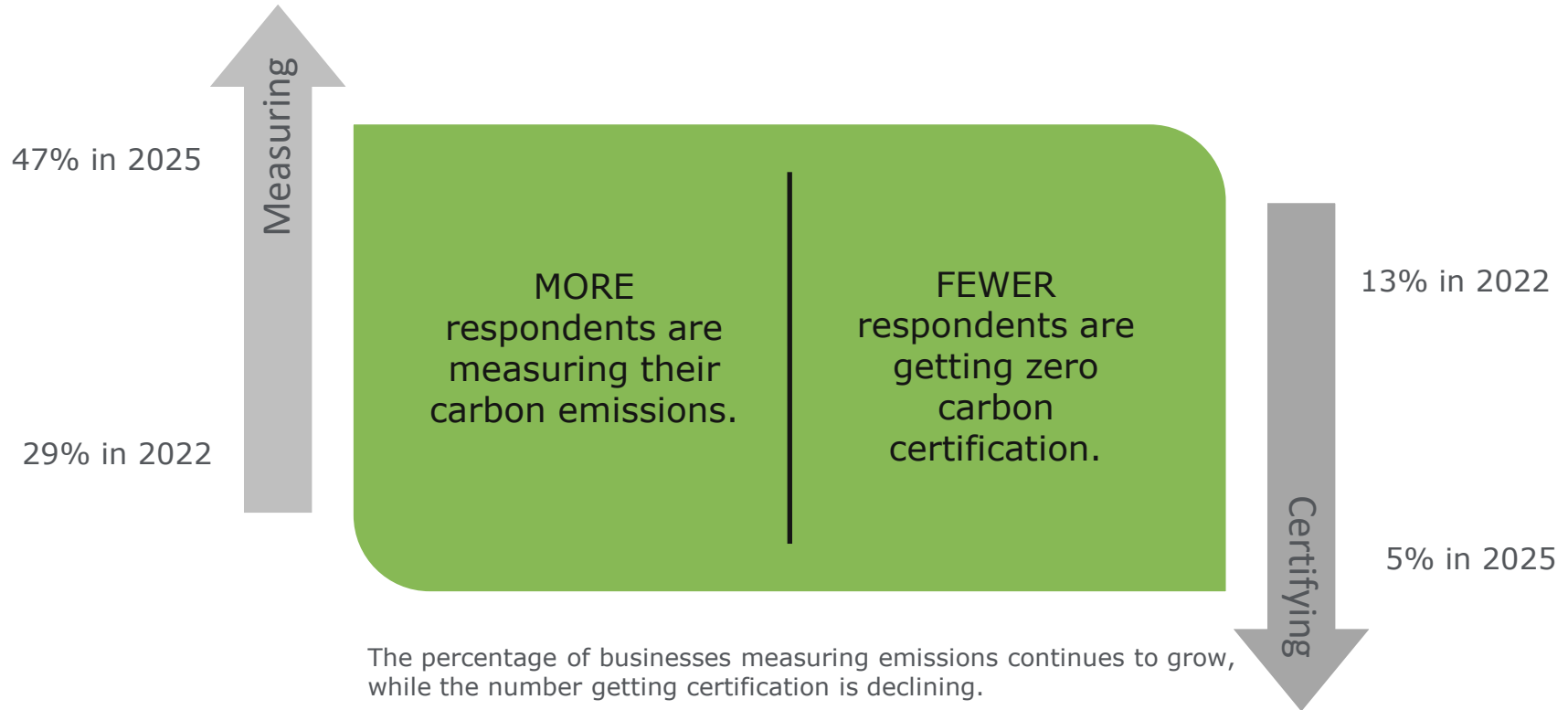
- Businesses are progressing on their carbon reduction journeys at different paces depending on their resourcing and needs.
- 53% have not yet taken concrete steps forward in measuring their emissions. This is a slight improvement on last year (51%).
- A wide range of tools are used to measure carbon emissions – this is a very fragmented market! The most popular tools used are Toitu and Ekos with 15% each.
- Some expressed dissatisfaction with certification schemes, opting instead for more direct action, such as supporting local conservation efforts.

We don't measure carbon, and have no plans to, but we may well be close to zero-carbon or better.

We are focusing on reducing our emissions vs just off setting be seen as zero carbon.

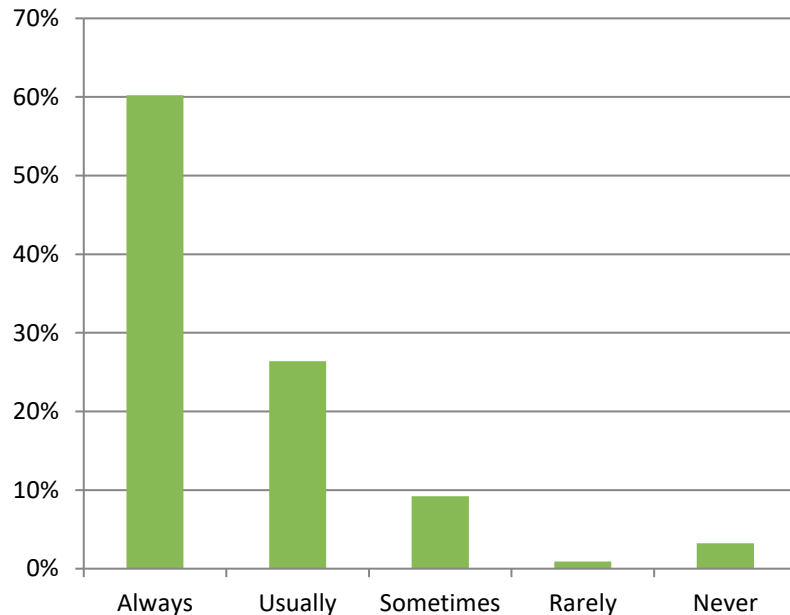
Investing in solar for the entire operation of the business in 2026

Carbon Measurement vs Certification



Commitment 12: Waste Elimination

Do you manage the waste your business produces with the objective of minimising what gets sent to landfill?



- Over half the respondents (53%) have completed a waste audit of their business.
- A majority of respondents (87%) always or usually manage their waste to minimise what gets sent to landfill.
- There is a slight increase in the number reporting that they never work to minimise waste sent to landfill (3% up from 1% last year).

We use no single use plastic in anything we supply on tours

We have 9 compost bins and bury any fats etc to help fertilize our garden. We recycle everything which is accepted

Some Further Comments

As a seasonal business and as we go through the waves it is incredibly hard to find any downtime to complete projects.

We are a not-for-profit, purpose-driven entity where all we do is centred around restoring and enhancing New Zealand's native flora and fauna.

Fuel - aviation and land based remains the largest challenge in tourism

We are always looking to improve our processes and practices as it is simply following good business practices and is the right thing to do.

Very difficult in the holiday park setting, guests are not good at recycling, and more than half can't be bothered making any significant effort

We work hard at our commitment to reducing waste and recycling. Our biggest challenge continues to be sourcing suppliers who have the same goal.

We find that this falls down the list of responsibilities as it is no one's specific role. A group has been established and we hope this will slowly build understanding and better decision making.

We very much believe that we are on a sustainability journey - it has highs and lows - and constant challenges, but we continue to learn and improve and are always seeking betterment of our business in this area.

*Just upgraded our compost and worm farm.
Working at ticking off more things on our action plan from the Green Room.*

*Really appreciate TIA's support and the TSC,
Thank you.*

